SKILLS DEVELOPMENT TEAM

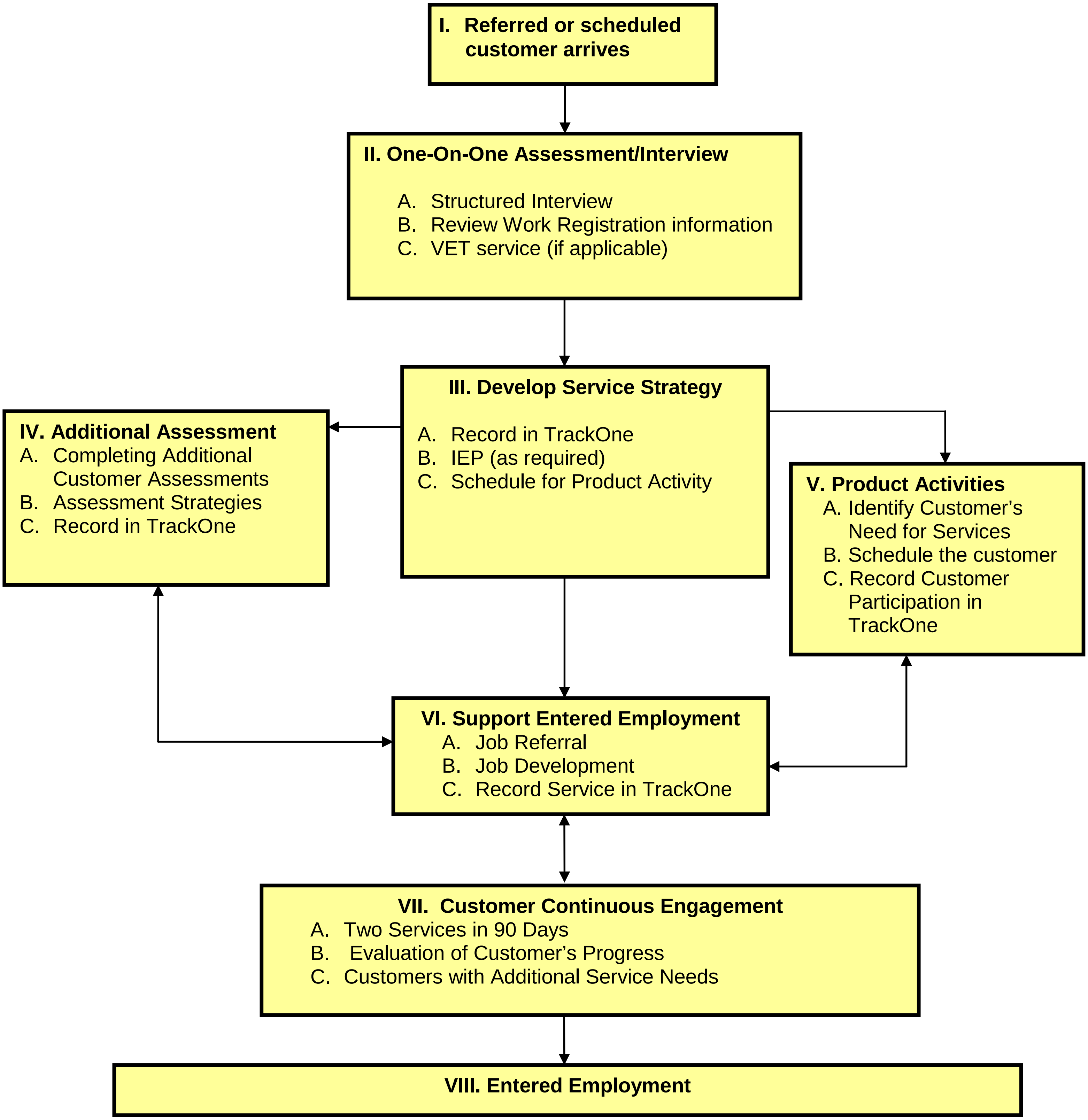
PROCEDURES

MANUAL

Skills Development Team Mission

The West Central Skills Team will help each person identify and enhance their skills in order to obtain a higher level of employment and meet demands of area employers.

Skills Development Team
Customer Flow Chart



Skills Development Team - Member

Functional Responsibilities

- Conduct further necessary, appropriate needs assessments with customers to identify skills, aptitudes, interests, and supportive service needs. Identify each customer's barriers to employment and services to address them.

- Facilitate a variety of employment and skill development services for customers addressing their needs in the areas of education, employment and supportive services. Facilitate services in group and one-on-one settings to customers with diverse backgrounds. Maintain familiarity with the local labor market to ensure services align with employer and labor market needs.

- Develop Service Strategies with customers to establish appropriate career goals and specific plans for WorkOne services, skill development activities and job search strategies. Update and modify plan as needed to ensure customer needs are met.

- Assist customers to attend needed skill development activities. This can include referring to in-house training and classes at outside training providers; assisting customers with the scheduling of appropriate training activities and the locating of financial aid; and sending training vouchers and associated forms to institutions and program service providers.

- Work with the Products Group to make activities available to customers to develop their skills, including basic skills development, customer service, computer skills, and job search skills.

- Help each customer develop a job search plan and pursue a job search.

- Assess customer's financial need when necessary to justify WorkOne expenditures.

- Maintain files and computer databases ensuring proper documentation is available to support program eligibility and services received.

- Maintain knowledge of and communication with other community agencies, programs and training offered. Appropriately refer individuals to community and partner agencies.

- Work with other WorkOne staff to continuously engage the customer through his/her attainment of employment goal.

- May occasionally assist with special projects such as specialized outreach programs to targeted groups and development of new skills training activities.

- Attend staff meetings, submit required reports, interpret program information, and make policy and/or procedural recommendations.

- Contribute in team member role(s) to ensure WorkOne Center performance standards are met and/or exceeded, and compliance with Federal, State, and WorkOne Center rules and regulations.

- Support other Teams as needed

Skills Development Team Procedure; Customer Flow Overview

I. Referred or Scheduled Customer Arrives at Skills Development Team

- Customer is referred to Skills Development Team and meets with a Team Member

II. One-On-One Assessment/Interview

- Review Track One Data. Be certain to review who the customer is assigned to and what Region. Make changes as necessary and see RO Policy for transfer to Region
- Initial assessment test results to gain baseline understanding of customer. Collect and add any new information about the customer as needed
- Learn why the customer has come to the center
- Look for specific skills that the customer may need to be successful in their effort to find work
- Identify and arrange for services to ensure immediate engagement of customer with WorkOne activities
- Ensure Work Registration and/or assist the customer in improving his/her work registration as appropriate

III. Develop Service Strategy

- Outline the customer's goals
- With the customer present, discuss and outline the steps necessary to reach his/her employment and wage goals
- Assign the customer to agreed-upon, needed activities
- Identify supportive service needs, if any. These may require in-depth assessment. Note: Direct cost supportive services require an in-depth assessment prior to delivery.
- When necessary, discuss the customer's case with other team members or teams to coordinate activities and funding
- Develop Individual Employment Plan (IEP) as required

IV. Additional Assessment (required of some customers)

- Determine customer goals and barriers
- Determine how customer goals fit within local labor market demand
- Complete appropriate assessment(s) of customer to better define current skills and skills gaps
- Determine if any additional documentation is needed to serve the customer (e.g. credentials, school transcripts, budget information).

V. Product Activities

- Refer to the customer to appropriate activities
- Review attendance and other documentation requirements
- Provide supportive services or make appropriate referrals if needed to ensure customer success in planned activities
- Schedule additional appointments or activities necessary to ensure customer success. When possible the customer should have another activity or visit scheduled before leaving the WorkOne Center.
- Register customers in all appropriate funding streams

VI. Support Entered Employment

- Help the customer identify the jobs that match their skills and make the appropriate referrals
- Develop job opportunities with non-BES TEAM employers

VII. Customer Continuous Engagement

- Review outcomes from all activities
- Update and revise the Services/IEP
- Continue to review supportive services needs. Provide necessary services or refer to community agencies.
- Ensure two services within 90 days

VIII. Entered Employment

- When the customer is successful in his or her effort to secure employment, the evaluation process shifts to focusing on the customer's need for assistance in ensuring job retention.
- If opportunity to record entered employment presents itself, Skills Team should record information in TrackOne

Skills Development Team Process

I. Greet the Customer

When the customer arrives in the Skills Team he/she is greeted.

II. One-on-One Assessment/Interview

A. Structured Interview

A structured interview is conducted by a Skills Team member. The purpose is to learn the customer's detailed work history and to clarify skills, educational and/or personal issues affecting success. This interview also further develops a customer's service strategy and identifies any required skills development, support or counseling services.

1. To engage the customer in activities, the team member provides him/her with an immediate service consistent with information from the initial interview. Examples of services offered to customers may include:
   - Providing information on short-term skills training, certification programs, computer skills training and occupational training opportunities
   - Creation of a KeyTrain account and a brief explanation on using the KeyTrain system
   - Scheduling the customer for workshop(s) appropriate to her/his needs.
   - Connecting the customer to an e-learning or tutorial-based activity
   - Providing a resume builder and if appropriate, assist the customer in updating his/her resume
   - Providing job leads appropriate to the customer's skills and abilities
   - Providing information on an upcoming job fair and suggesting how to prepare
   - Familiarizing the customer with the Skills Team resources and encouraging him/her to explore internet job search sites
   - Provide appropriate information on topics such as job search issues, interview tips, internet job search tips, resume suggestions, employment testing, financial aid information, and job fairs

B. Review Work Registration Information:

The Skills Development Team Member reviews the customer's registration to ensure that it is properly completed and make minor revisions if needed.

1. If significant adjustments are needed, Skills Team Member will schedule a follow-up appointment date or product activity.
2. An appointment card is provided to the customer to remind them of the follow-up appointment or workshop date.

C. Veteran Services (if applicable)

Many veterans will access employment and training services through the WorkOne system, including the full line of job search and job training services that are offered. Additionally, veterans are also entitled to preferences in the job searching and job referral process. To ensure that veterans have access to all needed services and that veteran's preference is applied as required, the following procedures have been put into place.

1. **Identify Veterans:** Most veterans are identified by the Talent Assessment Team during their entry into the WorkOne system. The process for engaging veterans is as follows:

   a. As Veterans come to the Skills Development Team, they are seen by an available Veteran Representative who provides the full range of services available in the WorkOne Center.
   b. If a Veteran Representative is unavailable, the veteran is seen by the next available Skills Development Team member. This ensures that veterans receive quick and efficient services and that they can get the service(s) they require during their visit.

2. **Refer Veterans to Veterans Staff as Needed**: As Skills Development Team members see veterans and provide them with services, some of these veterans may have issues or questions that are specific to veteran's preference, veteran's benefits, or veteran's programs. When this occurs, the Skills Development Team member arranges for the veteran to meet with a Veteran Representative to address the issue or question.
    a. If a Veteran Representative is available, the veteran is referred for immediate assistance with his or her issues or questions.
    b. If a Veteran Representative is not available, the veteran is scheduled for an appointment with the Veteran Representative using the internal electronic scheduling system. The veteran is provided with all other services that the Skills Development Team provides and is given an appointment card as a reminder of the day and time of their return visit.

3. **Record TrackOne Information for Veterans** (Refer to "A" in Appendix B): When veterans are provided with services, these services and appropriate case notes are reported in the TrackOne system that is dated the same date as the service in TrackOne. Case note for veteran's services should include the following information:
    a. Describe the service being provided to the veteran (for example, working on a resume, preparing for an interview, or dealing with a VA or GI Bill question); and,
    b. Describe details that show the depth of service being provided to the veteran (for example, jobs/employers to which resumes were mailed, details about the interview preparation activity, or suggestions for addressing the VA or GI Bill questions that were raised).

III. Service Strategy Development

Overview

Developing a Service Strategy means determining and documenting the services for achieving skills development and employment goals.

- Outline the customer's goals
- With the customer present, discuss and outline the steps necessary to reach his/her employment and wage goals
- Identify supportive service needs, if any. These may require in-depth assessment. Note: Direct cost supportive services require an in-depth assessment prior to delivery.
- When necessary, discuss the customer's case with other team members or teams to coordinate activities and funding
- Develop Individual Employment Plan (IEP) as required

A. Record Services in TrackOne (See "B" in Appendix B)

1. By now the customer should know his/her education and career goals. If not, additional meetings may be necessary. The team member works with the customer to plan his/her service strategy based on assessment results (*See Section IV for Additional Assessments)*. To document services, the team member completes an activity enter/exit into TrackOne and enters a case note on the same date. This should include a narrative containing the following information:

    - The case note should be titled **"Service Strategy/Name of the Activity."**
    - The specific activities in which the customer is participating.
    - The services that are planned for the customer and how these services will help the customer achieve their employment goal.

B. IEP Development (if required)

1. If the customer is to participate in Occupational Skills Training, On-The-Job Training, or Customized Training Activities, an IEP is required. Occupational Skills Training must be for occupations on the Growth and Demand Occupations list; and the provider must be WIA-approved and on the Eligible Training Provider list (www.state.in.us/dwd). WIA funds for such activities are subject to the approval of the Service Provider and/or Regional Coordinator. If training funds are to be expended, a hard copy file is created. TAA Service Plan must be approved by Senior State Staff.

2. The team member works with the customer to plan his/her activities based on assessment results (*See Section IV for Additional Assessments).* The IEP focuses first on broad employment and education outcomes including gaining skills needed by the local labor market. The Skills Team member will enter a case note in TrackOne on the same date that the IEP is developed (See "C" in Appendix B).

    - The case note should be titled **"IEP/Name of the Activity."**
    - The case note should review:
        - The customer's employment goal
        - A training schedule with a beginning and end date
        - The planned provider for each training activity
        - A rationale for referring the customer to training services
        - Any planned investments that are expected.
    - **The statement, "This IEP has been jointly developed with the customer." must be included in the case notes.**

3. Minor IEP changes can be documented in a new case note with an explanation that lets another Team Member understand what happened (Follow "C" in Appendix B, Steps 8 & 9).

4. The IEP is updated if there are significant changes in the customer's activities. The process for updating an IEP is the same as the IEP development process detailed in this manual and requires a case note.
    - The case note should be titled **"IEP Review/Name of the Activity."**
    - If a major revision or extension of a customer's IEP involving program funds is indicated or requested, the proposed changes should be reviewed and approved by the Service Provider (See "C" in Appendix B).

C. Schedule The Customer for Appropriate Activity
The Team member ensures that the customer knows when he/she is expected at the first training activity. If appropriate, an appointment card is provided to the customer.

IV. Additional Assessment Activities

A. Completing Additional Customer Assessment Activities: Once the customer is engaged in WorkOne services, more comprehensive assessments may be needed. Skills Team Customers participate in additional assessment activities as appropriate based on the team member's knowledge, expertise, and judgment.

1. Certain assessments are required for any customer who participates in occupational skills training, on-the-job training or customized training with an employer. See Regional Policy for the required assessments.

2. A review of the customer's financial circumstance (his/her budget) should be considered and discussed to ensure success when the customer is to receive occupational skills training, on-the-job training, customized training, and/or support services.

B. **Assessment Strategies:** Other assessments may be administered as appropriate to identify customer aptitudes, skills, learning styles and service needs. Assessments should not be synonymous with "testing." Assessment can also include gathering information on the participant, his/her skills, abilities and goals, and the local labor market. Examples may include:

Assessment Strategy	**Purpose of Strategy**
Initial KeyTrain Assessment	Identifies immediate basic skill needs.
WorkKeys® Assessments	Determines specific academic remediation needs. Also assesses the customer's readiness to complete an employment test.
Previous college/high school transcripts	Past school performance helps predict future performance in planned training activities.
Wonderlic Personnel Test – Form A	Provides an objective measurement of learning potential and learning
Aptitude/skills tests	Measures specific career aptitudes and/or employer skill expectations. May also measure technical or social skills.
Physical exam by physician	Establishes physical ability to perform a job, particularly a labor-intensive one. May be required for some jobs.
BMV records review	Establishes a customer's driving record for planned training activities requiring a driver's license or CDL.
Informational Interviews	Used to develop specific knowledge of employer needs and details of training activities required by employers.
Career Interest Inventory	Used to explore customer interests and aptitudes and determine career goals.
Required Training Provider Assmts.	Many schools require that assessments must be completed as part of registration and enrollment. These assessments identify a customer's readiness for occupational skills training as well as remediation needs.
Drug-free verification	As required by occupational goal.
Verification of Disability	If additional services are needed or accommodations are needed to ensure customer success. Also determines need for referral to VR or a physician to identify additional services or accommodations.
Criminal Record	Used to determine barriers for certain occupations.

C. **Record into TrackOne**
When a customer participates in comprehensive assessment activities, this is reported in TrackOne, including appropriate case notes. Describe the assessment activity and any new or critical information resulting from it (See "D" in Appendix B).

V. Product Activities

Overview

Many WorkOne services are delivered in group training or workshop settings. This may include training for job search, customer service, time management, computer skills and various academic training activities such as KeyTrain or Math brush up. WorkOne staff may deliver some pre-vocational activities, while others may be delivered by outside vendors. Pre-vocational activities are an important part of WorkOne continuous engagement strategy.

The Products and Career Advancement Teams will offer workshops and products useful to Skills Team customers. Including job search workshops, resume writing, interview preparation, and internet job search. *All* customers can access these available services and products in the WorkOne system. Customers connected to the Skills Team are referred and scheduled to participate as needed in these activities.

A. **Identify Customer Need for Service(s)**:
A Team member meets with the customer to review assessment results and identify specific Products activities that will enhance employability. The Team member reviews the customer's resume and assesses the customer's overall job search knowledge. Employment issues are addressed. The Team member uses assessment results as a guide to ensure identified barriers are addressed.

B. **Schedule the Customer**: As services are identified, the Team member works with the customer to set an appropriate time to begin the activity.

   1. If the customer is referred to an in-house training or workshop activity, directly schedule the customer for the activity, inform the customer of the date and time and give her/him an appointment card if appropriate.

   2. If the customer is referred to an activity delivered by an outside vendor, make arrangements for the customer to attend the activity. This includes contacting the vendor directly and scheduling the customer for the planned activity. If needed, issue a purchase order (PO) or other acceptable documentation to the vendor to confirm WorkOne's commitment to pay specific costs.

C. **Record Customer Participation in TrackOne**
   1. Once it has been confirmed that the customer has participated in a workshop or class, the classroom facilitator enters each customer into the appropriate activity/service in TrackOne and includes a case note (which is dated the same as the activity/service record). (See "E" in Appendix B)
   The case note must include the following:
      - The specific workshop in which the customer participated.
      - The content and purpose of the workshop.

   2. After each job club session, the job club facilitator will record the appropriate information in TrackOne. To ensure that this happens, the facilitator enters the customer into the appropriate activity in TrackOne and includes a case note (which is dated the same as the activity/service record) that includes the following information:
      - Job club activity in which the customer has participated;
      - The content of the job club activity.

   3. If customer is referred to an outside vendor for training, the service will be entered in TrackOne on the first date the participant is scheduled for the service.

VI. Customer Continuous Engagement
Overview

As customers participate in services and activities, progress in attaining skills and employment may be evaluated. As evaluation occurs, a customer may need services to further improve skills and/or enhance his/her employability. Evaluation identifies these additional service needs.

Key issues to be addressed by the Team member includes:

- Does the customer have all of the skills necessary to be successful on the job? If not, what additional services can be provided to develop these skills?
- Does the customer have all of the items (work clothing, for example) that the employer requires on the job? If not, does the customer need assistance in securing these items?
- Does the customer have all of the support systems in place to ensure job retention (child care, transportation, others)? If not, does the customer need assistance in attaining these support systems? (See Regional Operator Supportive Services/Participant Payment Policy)

A. Two Services in 90 days

Coordinate with Quality Assurance Team to re-engage the customer in WorkOne services to ensure that two services in 90 days are met.

B. Evaluation of Customer's Progress as Needed: Upon return visits by the customer and at appropriate times during the course of activities, the Team member evaluates the progress of the customer in their skill development and job placement efforts. Key issues that may be addressed in this evaluation would include:

- Was (or is) the customer successful in the activity? For example, did the customer gather the required skills to master a behavioral interview? Or did the customer develop an effective resume that can be customized to different employers?
- Have any barriers been identified that would interfere with the customer's ability to be successful in the activity?
- Is there feedback from the customer or any other source (employers, training providers, and partner organizations) that indicates a need for additional service(s)?
- Has the customer been able to secure employment with the skills they have?

C. Customers with Additional Service Needs: If, through this ongoing evaluation, a customer is determined to be in need of additional services, the Team member will immediately work with the customer to get them scheduled for the services they require.

- Additional services will be entered in TrackOne along with case notes that are dated the same day as the service. See section III-A&B for case note documentation. See "B" in Appendix B

VII. Support Entered Employment

A. Job Referral

Customer skills should be matched with skills required for job orders and the job order will specify the steps to apply for the position. Job orders will fall into three categories:

1. Jobs listed by employers currently working with the BES Team. Procedures for these jobs will be communicated in the Daily BS. Skills Team customers meeting the requirements can be scheduled or referred as directed in the Daily BS.
   - If the applicants meet all requirements except WorkKeys assessments, the applicants should be scheduled for WorkKeys. Contact the REACH Center if no testing sessions are listed for the WorkKeys assessment.
   - BES Team employers should NOT be contacted by the Skills team member, and referrals should NOT be made directly to these employers.

2. Jobs listed in the WorkOne job matching system by employers **NOT** working with the BES Team.
   - Potential applicants meeting the requirements should be referred by following the procedures outlined in the job matching system.
3. Jobs found in the job matching system but originally listed by the employer through another system.
   - Qualified applicants can be referred to these positions following the procedures outlined, and/or the candidate can make application on his/her own. The BES Team should be advised of these referrals for possible job listings in the future.

B. Job Development

1. When no job orders are found that match the applicant's skills the Skills team member can contact any employer NOT on the BES Team list to determine if there is a potential job and make a direct referral.
2. When the applicant's skill matches a job listing by a BES Team employer in some but not all requirements, and the Skills Team member believes the applicant could be a good candidate with some additional training, the Skills Team member should contact the BES Team for possible On-the-Job Training opportunity.

C. Record Service in Track One

When a Skills Development Team member assists a customer in pursuing appropriate job leads, this service must be entered in TrackOne. The case note will include the following information:

- The specific employer(s) that were contacted on behalf of the customer.
- How the employer was contacted
- Purpose of the contact

VIII. Entered Employment and Retention

If customer calls or the opportunity presents itself where a Team Member can obtain entered employment information, that information should be entered into TrackOne.